Electronic Case Filing
(ECF)

Creditor/Claimant Manual

United States Bankruptcy Court
District of Oregon

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Help Desk

The Help Desk is for any issues related to the accessing and use of the ECF application. A member of the Clerk's Office will be available to answer questions between the hours of 8:30 a.m. and 4:30 p.m. Monday through Friday Pacific Time, except Court holidays. The Help Desk telephone numbers are:

Eugene: (541) 465-6448, ext. 100
Portland: (503) 326-2231, ext. 100
Toll Free: (866) 777-0442, ext. 100

For non-ECF related questions, case specific questions and all general information, call:

Eugene: (541) 465-6448
Portland: (503) 326-2231

A **Public Access to Court Electronic Records (PACER)** account is required to view case files over the Internet. Register online at http://pacer.psc.uscourts.gov. or call 1-800-676-6856 to establish an account. If you already have a PACER account for BANCAP, it will remain active and useful for ECF.

Using a Browser to Log On to Electronic Case Files (ECF)

The following instructions will guide you in the basic use of a browser to log on to the ECF system.

STEP 1 On your PC desktop, access **Internet Explorer** by clicking on the icon.

STEP 2 The **Internet Explorer** screen displays.

❑ Enter the URL for the Court's website:
➢ www.orb.uscourts.gov

STEP 3 The Court's website displays. Always log on to ECF through the Court's website.

❑ Down the left side of the page, are links to various items. Click on the red ECF button to access ECF.

STEP 4 The ECF webpage displays. Please read the information contained on the webpage. Information and updates regarding ECF will be posted on this page including when the ECF system will be unavailable.

❑ Click on the link: ECF Live Database

STEP 5 The **Welcome to the U.S. Bankruptcy Court for the District of Oregon** page displays.

❑ Click on the District of Oregon - Document Filing System hyperlink.

STEP 6 The **ECF/PACER Login** screen displays.

❑ Enter your ECF login and password to file documents.

OR

❑ Enter your PACER login and password to view electronic case files.

STEP 7 The ECF Menu Bar displays.

- ❑ ECF is organized by headings, categories and events. In the blue banner are the headings: Bankruptcy, Adversary, Query, Reports, Utilities and Logout.

- ❑ If you click on each heading, the categories available to Creditor/Claimant e-filers will display. By clicking on the category, the events available in the category will display.

- ❑ The procedures included in this manual will reference which heading, category and event to use to electronically file documents.

STEP 8 To **LOGOUT** of the ECF System:

- ❑ Click on the Logout button on the Menu Bar.

- ❑ To close the browser, click the X in the top right corner of the ECF/Pacer Login screen.

ECF Filing Tips

GENERAL

- Per G.O. #03-3, Pt. 7, signatures must be denoted on electronically filed documents using "/s/ Name".
- The attorney's name indicated on a document must match the attorney's login name.
- Per G.O. #03-3, Pt. 8, routine cover or transmittal letters shall not be filed in ECF.
- Per G.O. #03-3, Pt. 20, a Certification of Compliance is not required on court forms.
- Per the Administrative Procedures, Pt. III.A.2., all e-filed documents must be in text-based pdf (i.e., not scanned) unless the filer did not create them.

CLAIMS

- File any final application for compensation in a Chapter 7 or Chapter 11 case as a claim.
- Other than applications for compensation, claims are limited to 5 pages of attachments to the Proof of Claim form. You must show any additional documentation to any party or the court upon request.

SERVICE

- Per G.O. #03-3, Pt. 14, ECF registered participants waive the right to receive first class mail and consent to receive e-mail service through ECF, except for service of a summons and complaint in an adversary proceeding under FRBP 7004 or a subpoena under 9016.
- To determine what parties in a case may be served via e-mail, click on Query from the ECF Main Menu, enter the Case Number, and click on Parties. Any party or attorney with an e-mail address will be electronically served.
- Parties get "one free look" at a document received from the ECF system.

TECHNICAL ISSUES

- To change your password, e-mail address, e-mail setup, or mailing address, click on Maintain Your ECF Account under Utilities.
- You must use Adobe Acrobat 6.0 to ensure success with the court's local bankruptcy forms (LBF's) in fillable pdf format.
- Other courts have reported problems with using Adobe Acrobat 7.0 with Internet Explorer 6.x. Please use the supported versions of the software as shown on the court's hardware and software requirements, available at http://www.orb.uscourts.gov/ecf.

Special Notice Request

This is a text-only event; a document need not be prepared and cannot be filed with the court.

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Batch**.

STEP 3. The **Case Number** screen displays.

- ❑ Insert the case number(s) using the YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Confirm the debtor(s) name and case number(s) are correct.

- ❑ Select **Special Notice Request** from the event list.
- ❑ Click **Next**.

STEP 5. If you are the attorney representing the creditor, continue with **STEP 6** below. If you are a non-attorney creditor, the **Select the attorney(s)** screen displays.

- ❑ Do **not** select an attorney, click **Next**.
- ❑ A dialogue box displays: **Note: you have not selected an attorney**.
- ❑ Click **OK**.

STEP 6. The **Select the Party:** screen displays.

- ❑ If the creditor is already a party to the case, continue with **STEP 7**. If the creditor is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford

Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.

- ❑ Click **Search**.

- ❑ If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on "**Create New Party**".

  - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.

  - ❑ If you are an attorney representing the creditor, do **not** enter an address for the creditor. Proceed to the **Role** field and change the role type to **Creditor**.

  - ❑ If you are a non-attorney creditor, enter your address. Refer to the Style Guide for naming conventions and accepted abbreviations. Proceed to the **ProSe** field and change to **yes**. At the **Role** field, change the role type to **Creditor**.

  - ❑ Click **Submit** and continue with **STEP 7.**

- ❑ If the creditor **is** in the database, a list will display.

  - ❑ If you are an attorney representing the creditor, click on each name until you locate a record **without an address or county showing as part of the party name** when viewing the dialogue box that appears as each name is highlighted.

    - ❑ If the creditor is listed without an address (the name must be an **exact match** and in line with the Style Guide requirements for entry of names), click **Select name from list**.

  - ❑ If you are a non-attorney creditor, click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.

    - ❑ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the Style Guide requirements for entry of names and addresses), click **Select name from list**.

- ❑ The **Party Information** screen displays.
  - ❑ If you are an attorney representing a creditor, click on the **Role** drop-down list and select **Creditor** as the Role type.
  - ❑ If you are a non-attorney creditor, at the **ProSe** field, change to **yes**; at the **Role** drop-down list, select **Creditor** as the Role type.
- ❑ Click **Submit**.

STEP 7. The **Select the Party:** screen displays.

- ❑ Select the party filer.
- ❑ Click **Next**.
- ❑ If you are a non-attorney creditor, continue with **STEP 9**.

STEP 8. If you are an attorney filing on behalf of a creditor and if you have not previously filed a pleading in this case on behalf of the creditor you represent, a screen displays with the following message: *The following attorney/party associations do not exist for this case. Please check which associations should be created for this case:*

- ❑ Check the box (click on it so a [✓] appears in the box).
- ❑ Click **Next**.

STEP 9. A reminder that this event is now **text-only** displays.

- ❑ Click **Next**.

STEP 10. A case verification screen displays.

- ❑ Click **Next**.

STEP 11. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 12. The **Notice of Electronic Filing** screen displays.

Change of Address

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Change of Address** from the event list.

- ❑ Click **Next**.

STEP 5. If you are the attorney representing the creditor, continue with **STEP 6** below. If you are a non-attorney creditor, the **Select the attorney(s)** screen displays.

- ❑ Do **not** select an attorney, click **Next**.
- ❑ A dialogue box displays: **Note: you have not selected an attorney**.
- ❑ Click **OK**.

STEP 6. The **Select the Party:** screen displays.

- ❑ If the creditor is already a party to the case, continue with **STEP 7**. If the creditor is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
- ❑ Click **Search**.

- ❑ If the creditor **is not** listed, or you see **Party search results** and **No person found**, click on "**Create New Party**".

  - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.

  - ❑ If you are an attorney representing the creditor, do **not** enter an address for the creditor. Proceed to the **Role** field and change the role type to **Creditor**.

  - ❑ If you are a non-attorney creditor, enter your address. Refer to the Style Guide for naming conventions and accepted abbreviations. Proceed to the **ProSe** field and change to **yes**. At the **Role** field, change the role type to **Creditor**.

  - ❑ Click **Submit** and continue with **STEP 7**.

- ❑ If the creditor **is** in the database, and a list will display.

  - ❑ If you are an attorney representing the creditor, click on each name until you locate a record **without an address or county showing as part of the party name** when viewing the dialogue box that appears as each name is highlighted.

    - ❑ If the creditor is listed without an address (the name must be an **exact match**, and in line with the Style Guide requirements for entry of names), click **Select name from list**.

  - ❑ If you are a non-attorney creditor, click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.

    - ❑ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the Style Guide requirements for entry of names and addresses), click **Select name from list**.

  - ❑ The **Party Information** screen displays.

    - ❑ If you are an attorney representing a creditor, click on the **Role** drop-down list and select **Creditor** as the Role type.

- ❑ If you are a non-attorney creditor, at the **ProSe** field, change to **yes**; at the **Role** drop-down list, select **Creditor** as the Role type.

❑ Click **Submit**.

STEP 7. The **Party Selection** screen displays.

❑ Select the party filer.

❑ Click **Next**.

❑ If you are a non-attorney creditor, continue with **STEP 9**.

STEP 8. If you are an attorney filing on behalf of a creditor and if you have not previously filed a pleading in this case on behalf of the creditor you represent, a screen displays with the following message: *The following attorney/party associations do not exist for this case. Please check which associations should be created for this case:*

❑ Check the box (click on it so a [✓] appears in the box).

❑ Click **Next**.

STEP 9. Click **Browse** to select the appropriate PDF to attach.

❑ Click **Next**.

STEP 10. A case verification screen displays.

❑ Click **Next**.

STEP 11. The **Docket Text: Final Text** screen displays.

❑ Confirm the docket text is correct.

❑ Click **Next**.

STEP 12. The **Notice of Electronic Filing** screen displays.

Notice of Appearance

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Insert the case number using the YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Notice of Appearance** from the event list.

- ❑ Click **Next**.

STEP 5. The **Select the Party:** screen displays.

- ❑ If the creditor is already a party to the case, continue with **STEP 6** below. If the creditor is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the party in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g. FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
- ❑ Click **Search**.
- ❑ If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on "**Create New Party".**
    - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last name field. Do **not** enter an address for the party, as they are represented by you. Proceed to the **Role** field and select **Creditor** as the Role type.
    - ❑ Click **Submit** and continue with **STEP 6**.
- ❑ If the creditors **is** in the database, a list will display.

- ❑ Click on each name until you locate a record **without an address or county showing as part of the party name** when viewing the dialogue box that appears as each name is highlighted.

- ❑ If party is listed without an address (name must be an **exact match** and in line with the Style Guide requirements for entry of names), click **Select name from list**.

❑ The **Party Information** screen displays.

- ❑ Click on the **Role** drop-down list and select **Creditor** as the Role type.

- ❑ Click **Submit**.

STEP 6. The **Select the Party:** screen displays.

❑ Select the party filer.

❑ Click **Next**.

STEP 7. If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message: *The following attorney/party associations do not exist for this case. Please check which associations should be created for this case:*

❑ Check the box (click on it so a [✓] appears in the box).

❑ Click **Next**.

STEP 8. A case verification screen displays, with the following message: *Do not use this event if you are filing a Special Notice Request. Use the text-only Special Notice Request.*

❑ Click **Next**.

STEP 9. The PDF attachment screen displays.

❑ Click **Browse** to select the appropriate PDF to attach.

❑ Click **Next**.

STEP 10. A case verification screen displays.

- ❑ Click **Next**.

STEP 11. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 12. The **Notice of Electronic Filing** screen displays.

Oregon Dept. of Revenue Objection

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Oregon Dept. Of Revenue Objection** from the event list.

- ❑ Click **Next**.

STEP 5. The **Select the attorney(s)** screen displays.

- ❑ Do **not** select an attorney, click **Next**.
- ❑ A dialogue box displays: **Note: you have not selected an attorney**.
- ❑ Click **OK**.

STEP 6. The **Select the Party:** screen displays.

- ❑ If ODR is already a party to the case, continue with **STEP 7**. If ODR is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter ODR in the **Last/Business name** field.
- ❑ Click **Search**.
- ❑ If ODR **is not** listed or you see **Party search results** and **No person found**, click on “**Create New Party**”.
  - ❑ The **Party Information** screen displays. ODR’s name will appear in the Last Name field.

- ❑ Enter your address. Refer to the Style Guide for naming conventions and accepted abbreviations. Proceed to the **ProSe** field and change to **yes**. At the **Role** field, select **Creditor** as the Role type.

- ❑ Click **Submit** and continue with **STEP 7**.

❑ If ODR **is** in the database, a list will display.

- ❑ Click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.

  - ❑ If ODR is listed with an address (the name and address must be an **exact match** and in line with the Style Guide requirements for entry of names and addresses), click **Select name from list**.

- ❑ The **Party Information** screen displays.

  - ❑ At the **ProSe** field, change to **yes**; at the **Role** drop-down list, select **Creditor** as the Role type.

❑ Click **Submit**.

STEP 7. The **Select the Party:** screen displays.

❑ Select the party filer.

❑ Click **Next**.

STEP 8. A case verification screen displays.

❑ A message displays: **Does the Objection include a Motion to Dismiss?** The default is No. If the Objection to Confirmation of Plan includes a motion to dismiss, change to Yes.

❑ Click **Next**.

STEP 9. Click **Browse** to select the appropriate PDF to attach.

❑ Click **Next**.

STEP 10. The **Docket Text: Modify as Appropriate** screen displays. Select an identifier from the drop-down list if appropriate.

- ❏ Confirm the docket text is correct.
- ❏ Click **Next**.

STEP 11. The **Docket Text: Final Text** screen displays.

- ❏ Confirm the docket text is correct.
- ❏ Click **Next**.

STEP 12. The **Notice of Electronic Filing** screen displays.

Oregon Dept. Of Revenue Withdrawal of Objection

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Insert the case number using the YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Confirm the debtor(s) name and case number are correct.

- ❑ Select **Oregon Dept. Of Revenue Withdrawal of Objection** from the event list.
- ❑ Click **Next**.

STEP 5. The **Select the attorney(s)** screen displays.

- ❑ Do **not** select an attorney, click **Next**.
- ❑ A dialogue box displays: **Note: you have not selected an attorney**.
- ❑ Click **OK**.

STEP 6. The **Select the Party:** screen displays.

- ❑ Select the party filer.
- ❑ Click **Next**.

STEP 7. The **Select the appropriate event(s) to which your event relates:** screen displays.

- ❑ Check the box to the left of the Objection to Confirmation of Plan being withdrawn.
- ❑ Click **Next**.

STEP 8. Click on **Browse** to select the appropriate PDF to attach.

- ❑ Click **Next**.

STEP 9. A case verification screen displays.

- ❑ Click **Next**.

STEP 10. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 11. The **Notice of Electronic Filing** screen displays.

Reaffirmation Agreement with and without Attorney Declaration

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select the appropriate **Reaffirmation Agreement** event from the event list.

- ❑ Click **Next**.

STEP 5. If you are the attorney representing the creditor, continue with **STEP 6** below. If you are a non-attorney creditor, the **Select the attorney(s)** screen displays.

- ❑ Do **not** select an attorney, click **Next**.
- ❑ A dialogue box displays: **Note: you have not selected an attorney**.
- ❑ Click **OK**.

STEP 6. The **Select the Party:** screen displays.

- ❑ If the creditor is already a party to the case, continue with **STEP 7**. If the creditor is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.

- ❑ Click **Search**.
- ❑ If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on "**Create New Party**".
  - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
  - ❑ If you are an attorney representing the creditor, do **not** enter an address for the creditor. Proceed to the **Role** field and change the role type to **Creditor**.
  - ❑ If you are a non-attorney creditor, enter your address. Refer to the Style Guide for naming conventions and accepted abbreviations. Proceed to the **ProSe** field and change to **yes**. At the **Role** field, change the role type to **Creditor**.
  - ❑ Click **Submit** and continue with **STEP 7.**
- ❑ If the creditor **is** in the database, a list will display.
  - ❑ If you are an attorney representing the creditor, click on each name until you locate a record **without an address or county showing as part of the party name** when viewing the dialogue box that appears as each name is highlighted.
    - ❑ If the creditor is listed without an address (the name must be an **exact match** and in line with the Style Guide requirements for entry of names), click **Select name from list**.
  - ❑ If you are a non-attorney creditor, click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.
    - ❑ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the Style Guide requirements for entry of names and addresses), click **Select name from list**.
  - ❑ The **Party Information** screen displays.
    - ❑ If you are an attorney representing a creditor, click on the **Role** drop-down list and select **Creditor** as the Role type.

  - ❏ If you are a non-attorney creditor, at the **ProSe** field, change to **yes**; at the **Role** drop-down list, select **Creditor** as the Role type.

- ❏ Click **Submit**.

STEP 7. The **Select the Party:** screen displays.

- ❏ Select the party filer.
- ❏ Click **Next**.
- ❏ If you are a non-attorney creditor, continue with **STEP 9**.

STEP 8. If you are an attorney filing on behalf of a creditor and if you have not previously filed a pleading in this case on behalf of the creditor you represent, a screen displays with the following message: *The following attorney/party associations do not exist for this case. Please check which associations should be created for this case:*

- ❏ Check the box (click on it so a [✓] appears in the box).
- ❏ Click **Next**.

STEP 9. Click **Browse** to select the appropriate PDF to attach.

- ❏ Click **Next**.

STEP 10. A case verification screen displays.

- ❏ Click **Next**.

STEP 11. The **Docket Text: Final Text** screen displays.

- ❏ Confirm the docket text is correct.
- ❏ Click **Next**.

STEP 12. The **Notice of Electronic Filing** screen displays.

Request for Hearing

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Request for Hearing** from the event list.

- ❑ Click **Next**.

STEP 5. If you are the attorney representing the creditor, continue with **STEP 6** below. If you are a non-attorney creditor, the **Select the attorney(s)** screen displays.

- ❑ Do **not** select an attorney, click **Next**.
- ❑ A dialogue box displays: **Note: you have not selected an attorney**.
- ❑ Click **OK**.

STEP 6. The **Select the Party:** screen displays.

- ❑ If the creditor is already a party to the case, continue with **STEP 7**. If the creditor is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
- ❑ Click **Search**.

- ❑ If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on "**Create New Party**".

- ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.

- ❑ If you are an attorney representing the creditor, do **not** enter an address for the creditor. Proceed to the **Role** field and change the role type to **Creditor**.

- ❑ If you are a non-attorney creditor, enter your address. Refer to the Style Guide for naming conventions and accepted abbreviations. Proceed to the **ProSe** field and change to **yes**. At the **Role** field, change the role type to **Creditor**.

- ❑ Click **Submit** and continue with **STEP 7.**

❑ If the creditor **is** in the database, a list will display.

- ❑ If you are an attorney representing the creditor, click on each name until you locate a record **without an address or county showing as part of the party name** when viewing the dialogue box that appears as each name is highlighted.

  - ❑ If the creditor is listed without an address (the name must be an **exact match** and in line with the Style Guide requirements for entry of names), click **Select name from list**.

- ❑ If you are a non-attorney creditor, click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.

  - ❑ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the Style Guide requirements for entry of names and addresses), click **Select name from list**.

- ❑ The **Party Information** screen displays.

  - ❑ If you are an attorney representing a creditor, click on the **Role** drop-down list and select **Creditor** as the Role type.

  - ❑ If you are a non-attorney creditor, at the **ProSe** field, change to **yes**; at the **Role** drop-down list, select **Creditor** as the Role type.

❑ Click **Submit**.

STEP 7. The **Select the Party:** screen displays.

- ❏ Select the party filer.
- ❏ Click **Next**.
- ❏ If you are a non-attorney creditor, continue with **STEP 9**.

STEP 8. If you are an attorney filing on behalf of a creditor and if you have not previously filed a pleading in this case on behalf of the creditor you represent, a screen displays with the following message: *The following attorney/party associations do not exist for this case. Please check which associations should be created for this case:*

- ❏ Check the box (click on it so a [✓] appears in the box).
- ❏ Click **Next**.

STEP 9. The **Select the category to which your event relates** screen displays.

- ❏ If you know the category of the event, select the category from the list. If you do not know the category of the event, highlight the entire list.
- ❏ Click **Browse** to select the appropriate PDF to attach.
- ❏ Click **Next**.

STEP 10. The **Select the appropriate event(s) to which your event relates:** screen displays.

- ❏ Check the box to the right of the document you are requesting a hearing (click on it so a [✓] appears in the box).
- ❏ Click **Next**.

STEP 11. A case verification screen displays.

- ❏ Click **Next**.

STEP 12. The **Docket Text: Final Text** screen displays.

- ❏ Confirm the docket text is correct.

❑ Click **Next**.

STEP 13. The **Notice of Electronic Filing** screen displays.

Withdrawal of Claim

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Withdrawal of Claim** from the event list.

- ❑ Click **Next**.

STEP 5. If you are the attorney representing the creditor, continue with **STEP 6** below. If you are a non-attorney creditor, the **Select the attorney(s)** screen displays.

- ❑ Do **not** select an attorney, click **Next**.
- ❑ A dialogue box displays: **Note: you have not selected an attorney**.
- ❑ Click **OK**.

STEP 6. The **Select the Party:** screen displays.

- ❑ If the creditor is already a party to the case, continue with **STEP 7**. If the creditor is **not** a party to the case, click on **Add/Create New Party**.
- ❑ A **Search for a party** screen displays.
- ❑ Enter the name of the creditor in the **Last/Business name** field. Refer to the **Style Guide** for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
- ❑ Click **Search**.

- ❑ If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on "**Create New Party**".
    - ❑ The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
    - ❑ If you are an attorney representing the creditor, do **not** enter an address for the creditor. Proceed to the **Role** field and change the role type to **Creditor**.
    - ❑ If you are a non-attorney creditor, enter your address. Refer to the Style Guide for naming conventions and accepted abbreviations. Proceed to the **ProSe** field and change to **yes**. At the **Role** field, change the role type to **Creditor**.
    - ❑ Click **Submit** and continue with **STEP 7.**
- ❑ If the creditor **is** in the database, a list will display.
    - ❑ If you are an attorney representing the creditor, click on each name until you locate a record **without an address or county showing as part of the party name** when viewing the dialogue box that appears as each name is highlighted.
        - ❑ If the creditor is listed without an address (the name must be an **exact match** and in line with the Style Guide requirements for entry of names), click **Select name from list**.
    - ❑ If you are a non-attorney creditor, click on each name until you locate a record with an address when viewing the dialogue box that appears as each name is highlighted.
        - ❑ If the creditor is listed with an address (the name and address must be an **exact match** and in line with the Style Guide requirements for entry of names and addresses), click **Select name from list**.
    - ❑ The **Party Information** screen displays.
        - ❑ If you are an attorney representing a creditor, click on the **Role** drop-down list and select **Creditor** as the Role type.

- ❏ If you are a non-attorney creditor, at the **ProSe** field, change to **yes**; at the **Role** drop-down list, select **Creditor** as the Role type.

❏ Click **Submit**.

STEP 7. The **Select the Party:** screen displays.

❏ Select the party filer.

❏ Click **Next**.

❏ If you are a non-attorney creditor, continue with **STEP 9**.

STEP 8. If you are an attorney filing on behalf of a creditor and if you have not previously filed a pleading in this case on behalf of the creditor you represent, a screen displays with the following message: *The following attorney/party associations do not exist for this case. Please check which associations should be created for this case:*

❏ Check the box (click on it so a [✓] appears in the box).

❏ Click **Next**.

STEP 9. The following message displays: **In the Status field, choose Withdrawn**. On the next screen, select **Withdrawn** from the drop-down list in the Status field.

❏ Click **Next**.

STEP 10. The **Enter Claim Number(s):** screen displays.

❏ Enter the claim number of the claim being withdrawn.

❏ Select **Withdrawn** from the drop-down list in the Status field. The Status of **Withdrawn and the document number** will be reflected on the claims register for the claim being withdrawn.

❏ Click on **Browse** to select the appropriate PDF to attach.

❏ Click **Next**.

STEP 11. A case verification screen displays.

- ❑ Click **Next**.

STEP 12. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 13. The **Notice of Electronic Filing** screen displays.

Withdrawal of Document

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Withdrawal of Document** from the event list.

- ❑ Click **Next**.

STEP 5. If you are the attorney representing the creditor, continue with **STEP 6** below. If you are a non-attorney creditor, the **Select the attorney(s)** screen displays.

- ❑ Do **not** select an attorney, click **Next**.
- ❑ A dialogue box displays: **Note: you have not selected an attorney**.
- ❑ Click **OK**.

STEP 6. The **Select the Party:** screen displays.

- ❑ Select the appropriate party.
- ❑ Click **Next**.

STEP 7. The **Refer to existing event(s)?** screen displays.

- ❑ Click on the box next to **Refer to existing event(s)?**
- ❑ Click **Next**.

STEP 8. The **Select the category to which your event relates** screen displays.

- ❑ Highlight the entire list under Type to bring up all the documents in the case.

- ❑ Click **Next**.

STEP 9. The **Select the appropriate event(s) to which your event relates:** screen displays.

- ❑ Check the box to the left of the document being withdrawn.
- ❑ Click **Next**.

STEP 10. Click on **Browse** to select the appropriate PDF to attach.

- ❑ Click **Next**.

STEP 11. A case verification screen displays.

- ❑ Click **Next**.

STEP 12. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 13. The **Notice of Electronic Filing** screen displays.

Withdrawal of Special Notice Request

STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.

STEP 2. Click on **Creditor Claimant Entries**.

STEP 3. The **Case Number** screen displays.

- ❑ Enter the case number in YY-NNNNN format.
- ❑ Click **Next**.

STEP 4. Select **Withdrawal of Special Notice Request** from the event list.

- ❑ Click **Next**.

STEP 5. If you are the attorney representing the creditor, continue with **STEP 6** below. If you are a non-attorney creditor, the **Select the attorney(s)** screen displays.

- ❑ Do **not** select an attorney, click **Next**.
- ❑ A dialogue box displays: **Note: you have not selected an attorney**.
- ❑ Click **OK**.

STEP 6. The **Select the Party:** screen displays.

- ❑ Select the appropriate party.
- ❑ Click **Next**.

STEP 7. The **Select the party or parties no longer associated with the case** screen displays.

- ❑ Select the appropriate party.
- ❑ Click **Next**.

STEP 8. A case verification screen displays.

- ❑ Click **Next**.

STEP 9. The **Docket Text: Final Text** screen displays.

- ❑ Confirm the docket text is correct.
- ❑ Click **Next**.

STEP 10. The **Notice of Electronic Filing** screen displays.

File Proofs of Claim Including Amendments/Assignments/Transfers

Pursuant to General Order #03-3, documents filed with a Proof of Claim may NOT exceed 5 pages.

STEP 1. Click on Bankruptcy on the ECF Main Menu Bar.

STEP 2. Click on **File Claims**.

STEP 3. The **Search for Creditor** screen displays.

- ❏ Enter the case number in YY-NNNNN format.
- ❏ Enter the name of the creditor in the **Name of creditor** field. When searching for a creditor, the more characters entered will narrow the search.
- ❏ The **Type of creditor** field defaults to Creditor.
- ❏ Click **Next**.

STEP 4. The **Select a Creditor for Claim** screen displays.

- ❏ If the creditor **is** listed, select the creditor from the drop-down list if the name and address are an **exact** match, click **Next** and continue with **STEP 11**.
- ❏ If the creditor **is not** listed, click on **Add Creditor** to add the creditor and continue with **STEP 5**.

STEP 5. Confirm the debtor(s) name and case number are correct.

- ❏ Click **Next**.

STEP 6. The **Add Creditor(s)** screen displays.

- ❏ Enter the name and address of the creditor. If there are two addresses, one for notices and one for payments; enter the address for notices.
- ❏ The **Type** field defaults to Creditor.

- ❏ If adding more than one creditor, click **Continue to Enter**. If adding only one creditor, click **Last Entry**.
- ❏ Click **Next**.

STEP 7. The **Total Creditors Entered** screen displays.

- ❏ Confirm the number of creditors entered is correct.
- ❏ Click **Submit**.

STEP 8. The **Creditors Receipt** screen displays.

- ❏ Confirm the number of creditors added to database is correct.
- ❏ Click **File a Proof of Claim**.

STEP 9. The **Search for Creditor** screen displays.

- ❏ Confirm the case number is correct or enter the correct case number.
- ❏ Enter the entire name or a portion of the name of the creditor in the **Name of creditor** field.
- ❏ The **Type of creditor** field defaults to Creditor.
- ❏ Click **Next**.

STEP 10. The **Select a Creditor for Claim** screen displays.

- ❏ Confirm the case number and case name are correct.
- ❏ Select the creditor from the drop-down list. If the creditor is listed more than once, select the creditor name with the correct address.
- ❏ Click **Next**.

STEP 11. The **Proof of Claim Information For** screen displays.

- ❏ Confirm the correct creditor and address are listed.
- ❏ If the claim amends, assigns or transfers a previously filed claim, enter the claim number of the original claim in the **Amends Claim #:** field.
- ❏ Skip the **Duplicates Claim #:** field.

- ❑ Select the appropriate party from the drop-down list in the **Filed By:** field. The default is Creditor.
- ❑ Skip the **Late:** field.
- ❑ From the drop-down list in the **Status:** field:
  - ❑ If the claim amends a previously filed claim, select **Amendment**.
  - ❑ If the claim assigns or transfers a previously filed claim, select **Transfer**, click **Next** and continue with **STEP 12. DO NOT ENTER ANY AMOUNTS.**
- ❑ Enter the amount of the claim in the appropriate fields under **Amount Claimed**.
- ❑ Skip **Amount Allowed**, **Description** and **Remarks** fields.
- ❑ Click **Next**.

STEP 12. Click Browse to select the appropriate PDF to attach.

- ❑ Click **Next**.

STEP 13. The Notice of Electronic Filing screen displays.

- ❑ This is the only opportunity to view the Notice of Electronic Claims Filing. It is not accessible from the Claims Register.
- ❑ The trustee does receive e-mail notification of the filing of the claim even though it is not indicated on the Notice of Electronic Claims Filing.

Query

Query is one of the main items on the blue banner Headings bar that appears immediately after a user logs in. A user can search for a particular case or adversary proceeding by its case number or search for a case or cases in which an individual or other entity has appeared. A user can find the case by any combination of the available fields shown in.

NOTE: PACER charges apply to any query or report.

Search Clues Screen

STEP 1. A user can search by any one or a combination of several of the available fields. However, for reasonable results, it is best if the search is NOT by just First Name, just Middle Name or just Type.

STEP 2. To Search by **Case Number**, click the case number field and enter the number (YY-NNNNN for bankruptcy case or YY-NNNN for adversary proceeding).

- ❏ Click on **Run Query** to continue or **Clear** to reselect the criteria.

STEP 3. To search by **Party Name**, click inside the field and enter the appropriate information. Note, user can enter the full last name or a portion thereof using the * only for missing interior letters.

- ❏ To further limit the name search, select a specific party type from the drop-down box in the **Type** field.
- ❏ When all of the search clues have been entered, click **Run Query** to continue or **Clear** to remove all the entries and begin again.

Results of Search

STEP 1. If more than one case fits the search data, all will display as hyperlinks. Click the case of interest and a brief summary will appear at the top of the screen with a list of hyperlinked options.

STEP 2. Select the appropriate hyperlink for query from the following options:

- **Aliases** - Displays all aliases associated with the debtor(s).

- **Associated Cases** - Displays other bankruptcy cases or adversary proceedings associated with the specific case, if any.

- **Attorney** - Displays all attorneys associated with the case.

- **Case Summary** - Displays a summary of basic case information which includes dates filed, discharged, dismissed or converted, names of debtor(s), debtor's attorney, and trustee plus other information.

- **Creditor** - Displays the creditors in the case.

- **Deadline/Schedule** - Displays deadlines/hearings set in a case. This report has multiple sort features, a hyperlink to the actual PDF document and a silver bullet to related filings.

- **Docket Report** - Displays the official case docket. It has multiple sorting options including sort by File Date or Entered on the Docket Date but for best results, use the "File Date" option. The docket report that is displayed may be printed.

- **Filers** - Displays a list of entities who have filed something in the case (NOT including those who have only filed claims) and the date the entity was added to the case. Clicking on the name of an entity will bring up a list of documents filed by that entity with a hyperlink to docket information for each entry and any related entries on the docket.

- **History/Documents** - Displays listing of entries/documents created in a case, with sorting options and hyperlinks to text.

- **Notice of Bankruptcy Case Filing** - Displays a Notice of Electronic Case Filing with date, time and court seal. This notice can be printed.

- **Party** - Displays the names and addresses of all parties who have filed anything in the case (NOT including those who have only filed claims) with the name and address of any attorney who represents them.

- **Related Transactions** - Displays case transactions and any other transactions to which it is related (linked). The user may select the type of document to include, pending or terminated or both and sort using either filed date, entered date or document number.

- **Status** - Displays most current case status.

- **Trustee** - Displays case trustee.

STEP 3. To print a report, click on **Print** button or icon from the browser toolbar.

STEP 4. To continue to query another case or exit Query, click on the blue banner Headings bar.

Reports

Reports is one of the Headings on the ECF blue banner bar. A PACER user can access the Cases, Claims Register, Docket Report, Calendar Events, Claims Activity, Creditor Mailing Matrix and Order Query via this option. The selection criteria for each of these reports are explained below but are also available on the Help screen that can be accessed by clicking on the yellow question mark on the banner menu.

IMPORTANT NOTE

Users are cautioned that reports that cover long periods of time could include dozens, if not hundreds, of pages. Because there is a per page charge for accessing reports and documents in ECF (*charged by PACER whether or not the user prints the report or document)*, a user is well advised to enter selection criteria carefully.

Cases

Displays cases filed, entered, discharged, dismissed, closed or converted.

STEP 1. Click on **Reports** from the blue banner Headings bar, then, click on **Cases** hyperlink. The selection criteria screen displays and allows the user to specify what information to include in the report.

TIP: User may leave the **Office**, **Case type**, **Trustee** or **Chapter** fields blank to search on all items that appear on those lists. To select two or more items listed for a field, press and hold the Control Key (Ctrl) while clicking on each item to be included from the list.

- **Date Type -** Several options are presented. User may select the date **Filed**, the date the case is **Entered** by the court or the **Discharged**, **Dismissed**, **Closed** or **Converted** dates by entering a beginning and an ending date in the desired field(s).

- **Open/Closed Cases -** Click in the box to remove or add a check to the applicable box.

- **Party Information -** Click in the box to have the report display party information such as address, tax ID, etc., if desired.

- **Sort by** - Three levels of sorting are provided. Click the down arrow at the end of each box to choose from the list.

STEP 2. Click **Run Report** to continue or **Clear** to re-select criteria. Case Report screen displays.

STEP 3. To view case information, click on the case number hyperlink to access **Query** menu. (*Refer to preceding Query section of this manual for specific information on each query option*).

STEP 4. To print the report, click on the **Print** button or icon from the browser toolbar.

Claims Register

The Claims Register Report displays the claims filed for a specific case.

STEP 1. Click on **Reports** from the blue banner Headings bar, then, click on the **Claims Register** hyperlink. The selection criteria screen displays and allows the user to specify what information to include in the report.

STEP 2. Selection Criteria include:

- **Case number** - click in box and enter the correct case number (YY-NNNNN) format.

- **Creditor type** - leave blank, all creditors are uploaded to a case as creditor; skip the **Creditor number** field.

- **Creditor name** - leave blank to bring up all creditors who have filed a claim or click in the box and enter a specific creditor's name. (*User can enter only the first letter or the first few letters of the creditor's name to get the most thorough search. If user types the entire name, only exact matches will be displayed*).

- **Claim number** leave blank to display all claims that fall within other search criteria or click inside the boxes and type specific claim numbers.

- **Filed** or **Entered** - will display either the filing date or the entered date, whichever is selected by clicking on the radio button.

- **Date Range -** if the default is accepted, the report will display all cases filed in the case. By entering dates in the beginning and ending fields, only claims entered or filed within a certain time frame will appear on the report.

- **Sort by** - Two sort criteria are offered. Click the down arrow to the right of the field and choose from the options on the list.

- Click **Run Report** to continue or **Clear** to reset the search criteria. The **Claims Register** displays.

- To print the register, click on **Print** button or icon from the browser toolbar.

- To view a claim, click on the Claim number hyperlink. The PACER Service Center Transaction Receipt will appear reflecting the number of pages that will be billed to user's PACER account. Click **View Document** to accept charges and continue.

Claims Activity Report

The Claims Activity Report lists information about claims along with links to any associated documents.

STEP 1. Click on **Reports** on the ECF blue banner Headings bar, then, click on the **Claims Activity** hyperlink.

STEP 2. The Claims Activity screen displays. The following fields are available for selecting/entering criteria for generating the report:

- **Case number** - To see claims for a particular case, enter a case number.

- **Office** - To limit claims by the office in which the case was filed, select one or more offices from the list. To view claims in both offices, leave this field blank.

- User may leave the **Trustee** and **Chapter** fields blank to search on all items that appear on those lists. To select two or more items listed for a field, press and hold the Control Key (Ctrl) while clicking on each item to be included from the list.

- **Creditor name** - To limit claims to those filed by a particular creditor, enter the name.

- **Entered Between -** To limit claims by the date on which they were filed, enter a date range.

- **Sort by -** Three levels of sorting are provided.

STEP 3. Click **Run Report** to continue or **Clear** to re-select criteria.

STEP 4. The Claims Activity Report displays.

- ❏ Click on the claim number hyperlink to view the proof of claim and any attached documentation.

- ❏ **Be sure to use the ⇦Back icon to return to the report.** If user clicks on the **X** at the top of the screen it will immediately exit user out of ECF.

STEP 5. To print, click on **Print** button or icon on the browser.

Docket Report Oldest Date First

The Docket Report allows the user to view and print a listing of all events docketed to a specific case. The default is Oldest Date First but the user has the option to switch the display order, as noted below in STEP 2.

STEP 1. Click on **Reports** from the blue banner Headings bar, then, click on the **Docket Report** hyperlink. The Selection Criteria screen displays and allows the user to specify what information to include in the report.

> **NOTE:** The opportunity to review charges FIRST applies to viewing/printing of PDF documents only. PACER charges apply if user runs ANY report.

STEP 2. The case number of the last case user accessed during the current ECF session displays automatically. Users can type another case number if they want to view the docket report for a different case using the YY-NNNNN format for bankruptcy cases and the YY-NNNN format for adversary proceedings. This is a required field.

- **Filed** or **Entered** option - To limit entries displayed to a date range, for best results select "filed" (when the document was filed) rather than "entered" (when the entry was recorded by the court in ECF) by clicking the radio button.

  After selecting the date type to be displayed, user may choose to enter a date range for the docket to display using the format MM/DD/YY or MM/DD/YYYY to limit the display.

User can enter a start date with no end date, which will include all entries from the date specified onward, or user can enter an end date and no start date, which will include all entries up to the specified date.

If no dates are entered, all entries will be selected. PACER charges apply to the number of pages displayed.

- **Documents -** Leave blank to display all documents or enter a beginning and ending number range to limit the display. This feature enables users to be charged only for the desired data on large cases.

- **Include terminated parties** - The docket will display all parties including those who have been terminated from the case. Uncheck the box to show only current parties in the case.

- **Include links to the Notice of Electronic Filing** - The hyperlink back to a copy of the Notice of Electronic Filing that was created when the event was originally filed will show on the docket as a "silver ball" link. It will reflect those parties who are receiving electronic notifications in the case.

- **HTML** and **Text** options - The docket report can be displayed in either **HTML** or **Text**. The default is **HTML**.

- **Sort by -** Click the down arrow to the right of the box to select how the docket is to be sorted. These options can affect the number of pages displayed and the PACER charges that apply. The options are: Oldest date first, Most recent date first, Document number ascending, and Document number descending.

STEP 3. Click **Run Report** to continue or **Clear** to reset all fields to their default values. The **Case Docket Sheet** screen displays.

> **TIP:** There is a scroll bar to the right of the screen which will move the docket sheet up or down.

STEP 4. To print the docket, click the **Print** button or icon on the browser toolbar.

STEP 5. To view a specific document, click on the document number hyperlink. The Pacer Service Center Transaction Receipt will appear reflecting the number of pages that will be billed to user's PACER account. If user chooses to accept the charges, click **View Document** to continue.

- ❑ After viewing the PDF document, either click on the ⇦**Back** icon of the internet browser's toolbar or close Acrobat Reader to return to the previously displayed screen.

> **NOTE:** **DO NOT** exit out of the document reader by using the **"X" button** at the top-right corner of the screen. This will immediately exit the user out of ECF.

STEP 6. To view the Notice of Electronic Filing, click on the silver ball next to the docket number hyperlink. If there are no silver balls next to the docket number hyperlinks, return to **STEP 2** above and check the "Include links to Notice of Electronic Filing" box.

- ❑ Click the appropriate radio button to **Select Receipt Type**
- ❑ Click **Display Receipt** to continue or **Clear** to re-select receipt type.

STEP 7. The **Notice of Electronic Filing** screen displays.

- ❑ To print click **Print** button or icon on the browser toolbar.

Calendar Events

This report will provide a list of scheduled events on a single day. It allows selection by case number, judge, date or other criteria. It will also display related proceedings and provide hyperlinks to the documents giving rise to the proceedings.

STEP 1. Click on **Reports** on the ECF blue banner Headings bar, then, click on the **Calendar Events** hyperlink.

STEP 2. The Calendar Events screen displays. The following fields are available for selecting/entering criteria for generating the report:

> **TIP:** User may leave the **Case number**, **Judge**, and **Office** fields blank to include all items that appear on those lists. To select two or more items listed for a field, while holding down the Control Key (Ctrl) click on each item to be included from the list. To limit the report, click on the desired items. The default setting is for all.

- **Calendar events** - Select one or more types from the list. The default is All Hearings.

- **Set** - Enter the beginning date and ending date in MM/DD/YY format and click either AM or PM or Both.

- **Time** - Enter the time, if desired, or leave blank for all.

- **Sort by** - The default sort for the report is by hearing time and case number. The "Office, Time" sort may be selected, but events which are not associated with a case or an office will be listed under the first office.

STEP 3. Click **Run Report** to continue or **Clear** to re-select criteria.

STEP 4. The **Calendar Event Report** displays.

STEP 5. To view case information, click on the case number hyperlink to get the Docket Sheet. User may change the sort or just click **Run Report.** (*Refer to preceding Docket Report section of this manual for specific information on the docket*).

STEP 6. Click on the ⇦**Back** icon on the browser toolbar to return to the report.

STEP 7. Clicking on the silver ball will bring up any related proceedings with hyperlinks to the documents giving rise to the proceedings.

> **TIP:** Be sure to click on the ⇦**Back** icon on the browser toolbar to return to the report. Clicking on the **"X" button** at the top of the screen will immediately exit user out of ECF.

STEP 8. To print the report, click on the **Print** button or icon from the browser toolbar.

Creditor Mailing Matrix

This report displays the list of creditors for a specific case. The list contains those creditors uploaded at case opening and may or may not include parties that have filed/docketed a pleading to a case. All of the creditors on this report were added through the Creditor Maintenance Option of the ECF System and used by the Bankruptcy Noticing Center (BNC) for court generated notices.

STEP 1. Click on **Reports** from the blue banner Headings bar, then, click on **Creditor Mailing Matrix** hyperlink. The selection screen displays and allows the user to specify what information to include in the report and the format.

- **Case Number** - Enter Case number using the YY-XXXXX format.
- **Special Mailing Group** - Skip this field.
- **Format** - Select either a "1 column" format or a "raw data format" (pipe-delimited). The 1-column file can be saved as a text file on the computer with the "File/Save As" browser option. The saved file can then be edited and printed on labels.

STEP 2. Click **Run Report** to continue or **Clear** to re-select criteria.

STEP 3. To run another report or exit Reports, click on the blue banner Headings bar.

E Orders - <u>Order Query</u>

STEP 1. Click on **Reports** on the ECF Headings Bar.

STEP 2. Click on **Order Query**.

STEP 3. The **Query Order Status** screen displays.

- ❏ Enter the case number using the YY-NNNNN or YY-NNNN format.
- ❏ Click **Next**.

STEP 4. A screen displays showing any pending (i.e., unsigned) proposed orders.

- ❏ If desired, click on the **Case Number** hyperlink to view the docket, the **Related Doc#** hyperlink to view the related motion or application, or the **Order** hyperlink to view the proposed order.
- ❏ If a submitted order does not appear on this screen, it may have been signed by the judge, in which case you will receive electronic notification when it is docketed. Alternatively, the judge may have decided not to approve it and deleted it, in which case you will be notified of the judge’s decision (generally via correspondence).

Utilities

Utilities permit you to manage your interactions with the ECF system and give access to case mailing information.

STEP 1. Click on **UTILITIES** on the ECF Headings Bar.

STEP 2. A menu titled **Your Account** and a menu titled **Miscellaneous** will display.

- ❑ The items on the **Your Account** menu allow you to access and manage your interactions with the ECF system as well as your PACER account as long as you have your PACER account associated with your login.

  To associate your login to your PACER account, go to Reports or Queries and click any menu item. You will be prompted for your PACER login and password. If you click the little box which says **Make this my default PACER login**, you won't need to enter it ever again and you will have all of the options listed here on your Utilities menu. If you do not do this, the options that allow you to manage your PACER account will not appear on your menu.

- ❑ The items on the **Miscellaneous** menu give you access to creditor lists for mailing and service purposes.

Change Your Client Code

This option allows entry of a new client code which is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty-two alphanumeric characters long. It is used for reporting charges made to the current PACER account.

STEP 1. Click on **Utilities**, then, under the **Your Account** heading, click the **Change Your Client Code** hyperlink.

STEP 2. Enter a new client code.

STEP 3. Click **Submit** to continue or **Clear** to reset.

STEP 4. Click on a Heading option of your choice on the blue ECF banner to continue.

Change Your Pacer Account

This screen lets you specify the PACER account to be charged for accessing ECF data. You will still have the privileges of the ECF account you used to start this session.

STEP 1. Click on **Utilities,** then, under the **Your Account** heading, click the **Change Your PACER Account** hyperlink.

STEP 2. Enter PACER login, password, and an optional client code.

STEP 3. If you check the box labeled "Make this my default PACER login", the one you enter here will replace any default you specified previously (if you establish a default, you will not be asked for a PACER login when you request data).

STEP 4. Click **Login** to continue or **Clear** to reset.

STEP 5. Click on a Heading option of your choice on the blue ECF banner to continue.

Maintain Your ECF Account

This function allows you to update your personal information and instructions about email notification.

STEP 1. Select **Utilities** then, under the **Your Account** heading click on **Maintain Your ECF Account** hyperlink.

- ❑ The **Maintain User Account** screen appears.
- ❑ Make appropriate changes or additions to your name, address, telephone number and/or fax number.
- ❑ Click **Submit** upon completing all changes/additions or **Clear** to reset.

STEP 2. Click the **Email information** button to specify how you want to be notified of ECF filings and the email address at which you want to receive notification.

- ❑ The email information for your account appears.
- ❑ **Primary email address** - specify the complete email address.
- ❑ **Send the notices specified below** - select either or both of the options: **to my primary email address**; and/or **to these additional addresses** and add additional email addresses in the text box.
- ❑ To receive notices for a case in which you are not involved, check the box for **Send notices in these additional cases** and enter the case number(s) in the text box.

- ❑ **Format notices -** select appropriate format: Either **html format** (for Netscape, Microsoft Explorer or ISP email service) or **text format** (for cc:Mail, GroupWise, other email service).

- ❑ Click **Return to Account screen** to continue making changes to your account and/or to submit changes once completed.

- ❑ Click **Submit** to make changes or click **Clear** to clear changes you may have made.

STEP 3. Click the **More user information** to make changes to your password.

- ❑ When you change your password, the new word is readable but only this once. Whenever this screen displays again, the password will be hidden.

- ❑ The groups to which you belong are listed. Group membership determines which functions you may use.

- ❑ Click **Return to Account screen** to continue making changes to your account and/or to submit changes once completed or click **Clear** to clear changes you may have made.

STEP 4. After all changes/additions have been made, click **Submit**. The system will display all cases you are involved in.

- ❑ **Update All -** default selection, click **Submit** to have address changes spread to all cases. To have address update spread to specific cases, but not all, hold down <Ctrl> key while clicking on specific cases.

- ❑ The updated information will be displayed.

STEP 5. Click on a Heading option of your choice on the blue ECF banner to continue.

Review Billing History

This option displays the number of ECF pages accessed and charges incurred for the PACER account you are currently using. Click on **Utilities,** then, under the **Your Account** heading, click on **Review Billing History** hyperlink.

- ❑ **Transactions dated -** Enter date range for which you want to see the billing data. **NOTE**: charges incurred at this ECF site during the last 3 months can be viewed. Older transactions can be viewed from the PACER Service Center Web site.

- ❑ **Sort -** If you enter client codes when you access ECF, the charges are totaled for each code. You can sort the report by date the charges were incurred, or by client code, then by date.

STEP 6. Click **Submit** to continue or **Clear** to reset display criteria. Billing history will display.

STEP 7. Click on a Heading option of your choice on the blue ECF banner to continue.

View Pacer Account Information

This option displays the current PACER account and client code, if any, in which you are currently logged into the database.

STEP 1. Click on **Utilities** from the blue banner Heading bar, then click on **View PACER Account Information** hyperlink.

- ❑ System displays the account information used to log into PACER.

STEP 2. To continue, click on a Heading on the blue ECF banner.

View Your Transaction Log

This option displays details of all transactions (docketing, etc.) on ECF on or between the dates you specify.

STEP 1. Click on **Utilities** from the blue banner Headings bar, then click on **View Your Transaction Log** hyperlink.

STEP 2. Enter the start date and end date for the report you want displayed.

STEP 3. Click **Submit** to continue or **Clear** to reset the dates.

- ❑ A list of all your activities in ECF during the time specified displays.
- ❑ To print the transaction log, click on **Print** from your browser toolbar.

STEP 4. To continue, click on a Heading on the blue ECF banner.

Mailings...

This option gives you access to Creditor Mailing Matrix, Mailing Information for a Case and Mailing Labels by Case.

Creditor Mailing Matrix - Displays creditor names/addresses for a single case.

STEP 1. Click on **Utilities** and, under the **Miscellaneous** menu, click on **Mailings...**, then, click the **Creditor Mailing Matrix** hyperlink.

- ❑ **Case Number** - Enter the case number of the bankruptcy case in the YY-NNNNN format.
- ❑ **Special Mailing Group** - Skip this field.
- ❑ **Format** - Select either a "1 column" format or a "raw data format" (pipe-delimited). The one column file can be saved as a text file on your computer with the "File/Save As" browser option. The saved file can then be edited and printed on labels.

STEP 2. Click **Run Report** to continue or **Clear** to reset the selections.